

What is claimed is:

1. In a software suite for enabling viewing and manipulation of multiple categories of aggregated data compiled from a plurality of data sources and
5 accessible through a single interfacing node operated on a data-packet-network, an interactive user-interface for ordering specific calculated and solution-oriented results related to finance, comprising:
 - an interactive drop-down menu containing a plurality of questions, the questions relating to various aspects of financial planning;
 - 10 an interactive inputs section containing a plurality of input data fields and selection boxes, the inputs section for configuring a calculative order;
 - a submission function for submitting the calculative order upon completion thereof; and
 - a results window for displaying the data results derived from the
15 calculations ordered, characterized in that a user operating within the user-interface selects an issue from the drop-down menu, populates any vacant data fields and or selection boxes displayed in the inputs section as a result of selecting an issue, and submits the data for server-side calculation and subsequent display of the calculated results.
- 20 2. The interactive user-interface of claim 1, wherein the data-packet-network is the Internet network.
3. The interactive user-interface of claim 2, wherein the plurality of data
25 sources are file servers maintained on the Internet network.
4. The interactive user-interface of claim 3, wherein the interfacing node is one of a personal computer, a cellular telephone, or a personal digital

assistant any of which has Internet-access capability in stand-alone fashion or through a host.

5 5. The interactive user-interface of claim 1, wherein the interface is presented in the form of HTML.

6. The interactive user-interface of claim 1, wherein the plurality of input data fields and selection boxes comprise a pre-configured electronic form.

10 7. The interactive user-interface of claim 6, wherein a preponderance of the input data fields are pre-filled before display with known account data.

15 8. The interactive user-interface of claim 7, wherein the results window contains options for displaying one or a combination of text results, table results, and graphic results.

20 9. The interactive user-interface of claim 1, wherein data results ordered through submission of a single calculative order are comparative according to more than one optional action available to the user.

10. The interactive user-interface of claim 1, wherein the data results are intended as advice to the requesting user before proceeding on a course of action which may affect one or more than one financial accounts held by the user.

25 11. An interactive method for ordering calculated and solution-oriented advice related to financial accounts managed for a user by a service

providing data procurement, aggregation, and summary services accessible through a data-packet-network, comprising steps of:

(a) invoking an interactive user-interface comprising:

an interactive drop-down menu containing a plurality of questions,

5 the questions relating to various aspects of financial planning;

an interactive inputs section containing a plurality of input data fields and selection boxes, the inputs section for configuring a calculative order;

a submission function for submitting the calculative order upon completion thereof; and

10 a results window for displaying the data results derived from the calculations ordered;

(b) choosing from the interactive drop-down menu a question related to a specific aspect of financial planning;

(c) entering the appropriate data into vacant ones of the input data fields and selecting appropriate ones of the selection boxes; and

(d) submitting the data for calculation.

12. The interactive method of claim 11, wherein the data-packet-network is the Internet network.

20

13. The interactive method of claim 12, wherein the plurality of data sources are file servers maintained on the Internet network.

14. The interactive method of claim 13, wherein the interfacing node is one
25 of a personal computer, a cellular telephone, or a personal digital assistant any of which has Internet-access capability in stand-alone fashion or through a host.

15. The interactive method of claim 12 wherein in step (a), the interface is presented in the form of HTML.

5 16. The interactive method of claim 11 wherein in step (a), the plurality of input data fields and selection boxes comprise a pre-configured electronic form.

17. The interactive method of claim 16 wherein in step (c), a preponderance of the input data fields are pre-filled before display with known account data.

10

18. The interactive method of claim 11 wherein in step (b), the questions listed in the interactive drop-down menu are related to various aspects of credit card accounts.

15

19. The interactive method of claim 11 wherein in step (b), the questions listed in the interactive drop-down menu are related to various aspects of general financial planning.

20

20. The interactive method of claim 11 further comprising a step for viewing calculated results.

21. The interactive method of claim 20, wherein the calculated results are comparative according to more than one optional action available to the user.

25

22. The interactive method of claim 20, wherein the calculated results are intended as advice to the requesting user before proceeding on a course of

[illegible]